DOCUMENT RESUME

ED 249 397 CE 039 860

TITLE	Simmons Insurance Agency. A Clerk-Typist Position Simulation. Employee's Manual. Office Occupations.
INSTITUTION	Columbus Area Vocational-Technical School, GA.; Georgia State Univ., Atlanta.
SPONS AGENCY	Georgia State Dept. of Education, Atlanta. Office of Vocational Education.
PUB DATE	82
NOTE	19p.; For related documents, see CE 039 859-865.
PUB TYPE	Guides - Classroom Use - Materials (For Learner) (051)
EDRS PRICE	MF01/PC01 Plus Postage.
DESCRIPTORS	Clerical Occupations; Individualized Instruction; Instructional Materials; *Insurance Companies; Job Skills; Occupational Information; Office Occupations Education; *Office Practice; Postsecondary Education; *Simulation; *Typewriting

ABSTRACT

This employee's manual is part of a position simulation developed for use in an office applications laboratory at the postsecondary level. The purpose of the simulation is to give the student an opportunity to become familiar with the tasks and duties performed by a clerk-typist working for an independent insurance agency. Contents include a description of the company, a company organizational chart, a job description for a clerk-typist in the organization, lists of required equipment and references, office rules and regulations (office procedures), general information (attendance, public relations, telephone use, appearance, character traits), information on employee/student evaluation and grading, and evaluation forms. (YLB)

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OFFICE OCCUPATIONS

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SIMMONS INSURANCE AGENCY

A Clerk-Typist Position Simulation

Employee's Manual

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Georgia Department of Education

OFFICE OCCUPATIONS

Developed and Produced
Under Contractual Agreement with

Division of Program Development
Office of Vocational Education
Georgia Department of Education
Atlanta, Georgia 30334
Charles McDaniel, State Superintendent of Schools
1982

UPD 7728/7-82

SIMMONS INSURANCE AGENCY

A Clerk-Typist Position Simulation

Developed by

Columbus Area Vocational-Technical School
Columbus, Georgia

Revised by

Georgia State University
Atlanta, Georgia

Project Supported by

Office of Vocational Education
Division of Program Development
Georgia Department of Education
Atlanta, Georgia 30334

Dr. Charles McDaniel, State Superintendent of Schools

1982

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FOREWORD

This clerk-typist position simulation has been developed for use in an office applications laboratory at the postsecondary level. Its purpose is to give the student an opportunity to become familiar with the tasks and duties that may be performed by a clerk-typist.

Appreciation is expressed to Mr. K. Gerald Allen, Project Coordinator, and to the business education instructors at Columbus Area Vocational-Technical School for the development of these materials.

Appreciation is also expressed to the many business education instructors throughout the state who field tested, evaluated, and provided invaluable feedback on these materials as a part of this revision effort.

Sincere appreciation goes to Dr. John H. Lloyd, Director, Program Development Division, for his continued support, encouragement, and leadership in this revision effort.

Dr. Harmon Fowler
Project Director
Office Simulation Project

Mrs. Doris Rash-Wooten
Assistant Project Director
Office Simulation Project

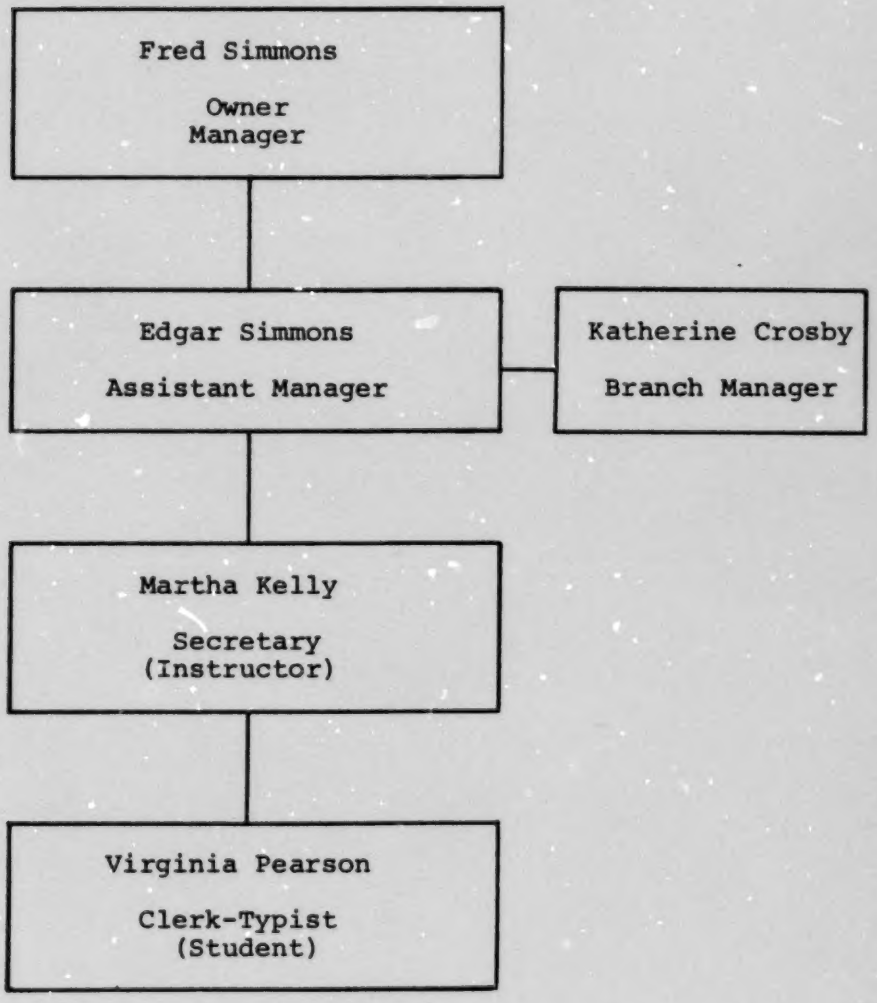
ABOUT THE COMPANY

SIMMONS INSURANCE AGENCY is a small, independent insurance agency. The company has been in existence since October, 1948. Mr. Fred Simmons founded the agency in Columbus, Georgia, and opened an office at 928 45th Street. In 1973, Edgar Simmons, Fred's oldest son, joined the firm. At the present time, Simmons Insurance Agency is located at the same address in Columbus; and the firm has opened a new office in Albany, Georgia. The manager in Albany is Katherine Crosby. (SEE ORGANIZATION CHART)

A wide variety of insurance coverage is offered by Simmons Insurance Agency. Clients may purchase insurance from a number of major insurance companies after research is completed by the Simmons Insurance Agency to select the best protection at the best possible price.

Mr. Fred Simmons is the owner and general manager of the Simmons Insurance Agency. His son, Edgar, is now a partner in the firm and acts as assistant manager. Martha Kelly was hired as the secretary for the firm when it opened in October, 1948. Martha handles the secretarial duties and serves as the customer service representative. Virginia Pearson was hired in June, 1975, to assume the clerk-typist duties required by the firm. Virginia is on maternity leave at the present time, and the student has been hired to perform her responsibilities in this absence. A job description gives an outline of the duties and responsibilities of the position.

ORGANIZATION CHART



JOB DESCRIPTION

Listed below are some of the duties that a clerk-typist in this organization performs.

--Types reports, stencils, forms, addresses, or other straight-copy material from rough draft corrected copy.

--Locates and attaches appropriate file to correspondence to be answered by employer.

--Files correspondence and other records.

--Types answers to routine correspondence; i.e., form letters.

--Compiles and types statistical reports.

--Answers and places telephone calls.

--Prepares duplicated materials.

--Proofreads printed material.

--Keeps track of supplies and reorders supplies.

--Sets up retention schedules for the files.

--Verifies totals on reports, forms, requisitions, or bills.

--Compiles and codes information; verifies accuracy of reports compiled or coded by staff; and checks documents for completeness and adherence to established formats.

--Operates related office machines.

--Performs other general office duties as needed.

EQUIPMENT

The following equipment will be supplied for your use during the simulation:

Typewriter
Calculator or adding machine
Desk calendar
Stapler
Staple remover

REFERENCES

A reference center will be furnished for you to use in the position simulation. This will be in a central location and will contain the following:

Word finder
Secretarial handbook
Style manual for typewriting
ZIP Code directory
Telephone directory
Office supply catalog
Hotel/motel guide (OPTIONAL)

OFFICE RULES AND REGULATIONS

Office procedures included in this section are to be followed in the preparation of work for the Simmons Insurance Agency.

Letters

Letters will be typed on letterhead stationary in an attractive letter style. Adjust the margins to the letter size. When a reference line is used, it will be placed double space below the salutation. Make the appropriate number of carbon copies.

Envelopes

The address should be in block form with all of the lines having a uniform left margin to conform with current postal regulations. Type all necessary envelopes.

Memorandums

Letterhead memo forms are to be used. Adjust margins to balance with the form. Use your reference initials in lower case letters.

Filing System

Letters, memorandums and speed letters are filed by the name of the customer to whom the correspondence is addressed. Each piece of correspondence should be coded as follows:

3 2 1
J. L. Harper (Mrs.)

Correspondence that has not been signed should be placed in a "For Your Signature" folder, and it is also helpful to have a folder marked "To Be Filed" for correspondence that is waiting to be filed. It is a good idea to maintain a folder labeled "Pending" for those things that require further attention.

An "out guide" should be used when a folder is removed from its usual filing place.

File folder labels should be typed in a uniform manner. Begin on Line 2, 3 spaces from the left edge. The captions should appear in indexing order.

Tabulations

All materials should be arranged in logical order (alphabetic, numeric, etc.) with an even number of spaces between columns. All main titles and secondary titles are centered; however, column headings may be centered or blocked. Material should be centered vertically and horizontally.

Mail Procedures

Daily correspondence received should be answered, filed, and processed according to purpose the same day, or as soon as possible.

Outgoing mail will be given to the clerk-typist each day for weighing, metering, stamping, etc.

When preprinted forms are used, align typing with rulings on form.

All policies should be proofread by a second person before leaving the office. This will help to minimize errors leaving our office.

All policies, letters, and other correspondence should be considered confidential and not left out for others to read.

Machine Transcription

Mr. Simmons records some company correspondence each day. Transcription tapes should be checked early each morning for things that need to be transcribed immediately. Other material can be transcribed as time permits during the day.

Equipment should be left in a "ready-to-use" manner after each day's use. Mr. Simmons sometimes dictates after office hours.

Miscellaneous

Employees should observe the proper chain of command when making requests or complaints. (SEE ORGANIZATION CHART)

Supplies are purchased and distributed by the secretary. Any additional supplies needed can be secured upon request.

Each employee is responsible for clean equipment and making certain that equipment in their work area is maintained. All other equipment in the office is to be maintained by the Columbus Office Equipment Company with the approval of Mr. Simmons.

Regular office hours for all employees are from 8:30 a.m. - 4:30 p.m., Monday through Friday.

Evaluation is done on an individual basis by Ms. Kelly, Secretary.

Coffee break is 15 minutes long, to be taken on an individual basis as work flow permits. An hour may be taken for lunch.

A calendar should be maintained for all appointments, meetings, etc. As these are arranged, enter them on your calendar to avoid conflict in scheduling. Check your calendar each morning and provide a list of appointments for Ms. Kelly.

In the student packet, each task has been labeled for easy indentification in the upper right-hand corner as follows:

I	-	2	-	3
(Packet)		(Task)		(Page of Task)

Attendance

When an employee is absent or tardy, other employees must not only do their own jobs but must take over for the absent employee. This, of course, slows down office production; and the entire office staff is affected. Therefore, it is very important that you are absent only when too ill to work. Excessive absenteeism or tardiness will reflect unfavorably on how you are evaluated. Punctuality is the key to starting the day with energy and enthusiasm.

Many times you are the only contact that customers will have with the company. Therefore, you are expected to display an attitude of cooperation, courtesy, and kindness in dealing with customers, as well as with fellow employees and supervisors. YOU reflect the company's image!

Public Relations

People want to be noticed. They want to be made to seem important, they want to arouse feelings of friendliness, and they want to be made welcome.

1. Greet callers with a smile.
2. Inquire if you can be of service to the visitor, determine his/her needs and direct him/her to the proper party.
3. Create the impression of accessibility by arranging appointments so that they don't overlap, thus keeping some people waiting unnecessarily while making other appointments offensively brief.
4. As each visitor leaves, look up from your work to make a farewell remark.

Telephone Use

An effective telephone personality will help you win friends and create goodwill. The person you are talking to cannot see you--cannot see your smile, cannot see your facial expression. Your attentiveness can only be judged by how you sound. Everything depends on your voice and telephone habits.

1. Maintain a friendly, businesslike manner.
2. Identify the office in a useful way.

3. Jot down important facts as they come up.
4. Offer to take a message or be of assistance if the party being called is not in.
5. Give definite but discreet information.
6. Don't transfer on chance.
7. Acknowledge delays or interruptions.
8. Screen calls discreetly.
9. Close calls definitely.

Do not block the business lines with personal calls!!!

Appearance

The employee should be neat and clean. Hair should be well groomed, fingernails clean, clothes cleaned and pressed, and shoes shined to present an overall well-groomed look.

One should be selective about what is worn to the business office. Shorts, jeans, evening wear, etc., are not acceptable attire for a business office. Be mindful of this fact because one's appearance plays a very important role in obtaining and maintaining employment.

Character Traits

1. Confidence--This quality is an outgrowth of competence. Ability to do a variety of jobs well will help you to develop confidence in yourself.

2. Initiative--Be a person of stability and moral soundness.

3. Ambition--This quality will help to overcome obstacles and to reach a definite goal.

4. Honesty--Be honest with yourself and with the company for which you work. There are many opportunities every day to demonstrate this trait.

5. Loyalty--Be loyal to the company for which you are working. If you feel that you cannot be loyal to your employer, then try to secure another position.

6. Trustworthiness--Build the reputation that you can be trusted with responsible assignments and matters of business confidence.

7. Courage--Overcome difficulties without fear. Be willing to admit mistakes and take the consequences. Do not "pass the buck."

8. Dependability--Carry through a job to a successful conclusion.

9. Perseverance--Learn to complete assigned tasks no matter how difficult nor how long they may take.

10. Cooperation--Work well with others. Be able to follow the instructions given to you by your supervisors.

EVALUATION

The employee (student) is placed on an initial two-week trial period and will be evaluated every two weeks thereafter for the first eight weeks of employment. At the end of the eight-week period, employees will then be reclassified as to their readiness for permanent status with the company.

Employees should be aware of the areas on which employees will be evaluated and try to do their best so that they will receive excellent ratings.

The Employee Evaluation form is provided on the next page of this manual. The instructor will use this or a similar one.

GRADING

Your work will be graded by the instructor on a regular basis. A suggested grading scale for the packets is as follows:

Perfect	A
Mailable	B
Retyped once	C
Unmailable after retyping	F

On the page following the overall employee evaluation form is a progress record that may be kept by the instructor.

EMPLOYEE EVALUATION

Employee's Name_____ Social Security No._____
Position_____ Date _____

	RATING
ATTENDANCE	
Punctuality	
Absenteeism	
ATTITUDE	
Attitude toward job	
Attitude toward other employees	
Attitude toward supervisors	
Loyalty for company	
EFFICIENCY	
Quantity of work	
Job knowledge	
Alertness	
Planning	
OFFICE SKILLS	
Typing	
Transcription	
Machines	
Filing	
Miscellaneous	
CHARACTER	
Initiative	
Dependability	
Confidentiality	
Cooperation	
Self-control	
Self-confidence	
Personality	
Flexibility	
Courtesy and tact	
PERSONAL APPEARANCE	
Appropriate	
Neatness	
MISCELLANEOUS	
Neatness of work area	
Observing chain of command	
Following flow of paper work	
Other	
TOTAL RATING	

(Ratings: Excellent = 5 pts.; Good = 4 pts.; Average = 3 pts.; Poor = 1 pt.)

STUDENT PROGRESS RECORD

Task No.	Description	Date Started	Date Completed	Perfect	Mailable	Retyped Once	Unacceptable